

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits and Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 860 - 5393 - XXX	
DIVISION/UNIT Retirement Readiness Division / Quality Management	CLASS TITLE Associate Governmental Program Analyst	
INCUMBENT NAME	WORKING TITLE Quality Management Analyst	
CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.		
<p>The Retirement Readiness Division (RR) is the principal area of the organization that develops, delivers and coordinates educational services to CalSTRS members, employers and staff. The goal of the RR is to ensure that all members receive adequate, timely and accurate information in order to make sound decisions regarding their CalSTRS benefits.</p> <p>Under the direction of the Pension Program Manager I, the Associate Governmental Program Analyst (AGPA) independently performs a wide variety of more complex duties as they relate to performing CalSTRS Benefits Planning with members. The Quality Management Unit is responsible for ensuring program compliance of all benefits specialists who provide Benefits Planning sessions to CalSTRS members and their beneficiaries both at headquarters and at field location sites.</p>		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.	
	ESSENTIAL FUNCTIONS	
25%	Quality Assurance: Travel to locations statewide where Benefits Planning Sessions are delivered to CalSTRS members. Evaluate and monitor the information presented, to ensure that the delivery of benefits planning sessions is accurate and consistent within the established guidelines. Develop and design rating criteria to measure performance. Participate in calibration sessions to ensure scoring consistency. Work closely with Management and staff in the Training Unit to identify areas where ad hoc training would be beneficial.	
25%	Quality Control: In the Quality Control process, research member's accounts utilizing appropriate databases, appointment scheduling application and Imaging system to compile and evaluate documentation to determine if the information presented during a Benefits Planning session complied.	
20%	Benefits Planning Sessions: Independently conduct individual and group Retirement Benefits Planning sessions with CalSTRS members according to RR policies and procedures; research, analyze, interpret and accurately explain the California Education Code, policy memos, administrative directives, management memoranda, CalSTRS benefits and a range of CalSTRS programs to a membership of varying degrees of program understanding; access CalSTRS systems to retrieve, research and analyze member data to properly prepare for Benefits Planning sessions and ensure the accuracy of information provided; utilize computer programs to calculate retirement benefit calculations based on specific member information such as, but not limited to, estimated retirement date, option beneficiaries and unused sick leave balances. Conduct retirement planning workshops at locations throughout the state in groups ranging from 5 – 100 individuals. Promote CalSTRS member education opportunities at various outreach events.	
15%	Project Team Participation: Represent RR on project teams that have substantial program or departmental impact. Working closely with the Manager in the Program Development Team (PDT), participates in the planning, analysis, development, project oversight, execution, communication, testing and implementation of RRD projects.	

10%

This will include risk and problem identification, escalation and resolution. Develop business processes, assist in translation of those processes effectively into clear and understandable documented policies and procedures that are regularly maintained, and review for process improvement. Guide and assist staff in preparing complex issue papers, project updates and end to end requests for RR projects.

Technical Assistance: Provide technical guidance, direction and ongoing support to the Benefits Specialists who conduct Benefits Planning sessions and CalSTRS workshops using extensive knowledge of CalSTRS laws, policies, procedures, and programs.

5%

MARGINAL FUNCTIONS

Group Presentations: Review and provide input on draft products to present clear and concise information to clients or other interested parties regarding the technical complexities of RR programs and projects. Make presentations to management, staff and field benefits specialists on the Quality Management program.

COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies:

- Adaptability/Flexibility
- Communication
- Customer/Client Focus
- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies:

- Analytical Thinking
- Creative Thinking
- Ethics and Integrity
- Forward Thinking
- Managing Work
- Organizational Awareness
- Planning and Organizing
- Technical/Professional Knowledge and Skills
- Thoroughness
- Written Communication

CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Ability to support and model CalSTRS Core Values
- Handle matters of extreme sensitivity while ensuring confidentiality.

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Prolonged periods of standing, bending, sitting, kneeling.
- In-State travel required up to 25% with occasional overnight travel.
- Work in a high-rise building, in an open space environment.
- Office setting with low partitions.
- Work hours may be various, such as shift work, weekends, evenings and holidays.
- Ability to use a computer keyboard several hours a day.
- Read from computer screens several hours a day.

- Ability to move tables and chairs for multiple conference room configurations.
- Ability to lift laptop, portable printer, portable projector for use in and out of the Member Service Center.
- Talk on the telephone for extended periods using a headset.

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

To be reviewed and signed by the supervisor and employee:

SUPERVISOR'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED



☒ PROPOSED

☐ CURRENT

DUTY STATEMENT

EFFECTIVE DATE

BRANCH

Benefits and Services

POSITION NUMBER (Agency – Unit – Class – Serial)

815 - 860 - 5157 - XXX

DIVISION/UNIT

Retirement Readiness Division / Quality Management

CLASS TITLE

Staff Services Analyst

INCUMBENT NAME

WORKING TITLE

Quality Management Analyst

CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.

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Under the supervision of the Pension Program Manager I, the Staff Services Analyst performs a wide variety of duties as they relate to performing CalSTRS Benefits Planning with members. The Quality Management Unit is responsible for ensuring program compliance of all benefits specialists who provide Benefits Planning sessions to CalSTRS members and their beneficiaries both at headquarters and at field location sites.

% of time
performing
duties

Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.

ESSENTIAL FUNCTIONS

35%	<p>Quality Assurance: Evaluate and monitor the scheduling of members into benefits planning sessions under direct supervision of PPML. Ensure the delivery of benefits planning session information is accurate and consistent within the established guidelines. Assist with the development and design of rating criteria to measure performance. Participate in calibration sessions to ensure scoring consistency. Handles matters of extreme sensitivity or complexity while ensuring confidentiality. Works closely with Management and staff in the Training Unit to identify areas where ad hoc training would be beneficial.</p>
25%	<p>Quality Control: In the Quality Control process, research member's accounts utilizing appropriate databases, appointment scheduling application and Imaging system to compile and evaluate documentation to determine if the information presented during a Benefits Planning session complied.</p>
10%	<p>Project Team Participation: Represents Retirement Readiness on project teams that have substantial program or departmental impact. Working closely with the Manager in the Program Development Team (PDT), assists in the planning, analysis, development, project oversight, execution, communication, testing and implementation of Retirement Readiness projects.</p> <p>This will include risk and problem identification, escalation and resolution. Develop business processes, assist in translation of those processes effectively into clear and understandable documented policies and procedures that are regularly maintained and review for process improvement. Guide and assist staff in preparing issue papers, project updates and end to end requests for RR projects.</p>
15%	<p>Technical Assistance: Provide technical guidance, direction and ongoing support to the Benefits Specialists who conduct Benefits Planning sessions and CalSTRS workshops using extensive knowledge of CalSTRS laws, policies, procedures, and programs.</p>
10%	<p>Benefits Planning Session: Under supervision, conduct individual and group Retirement Benefits Planning sessions with CalSTRS members according to RR policies and procedures; research, analyze, interpret and accurately explain the California Education Code, policy memos, administrative directives, management memoranda, CalSTRS benefits and a range of CalSTRS programs to a membership of varying degrees of program understanding; access CalSTRS systems to retrieve, research and analyze member data to properly prepare for Benefits Planning sessions and ensure the accuracy of information provided; utilize computer programs to calculate retirement benefit calculations based on specific member information such as, but not limited to, estimated retirement date, option beneficiaries and unused sick leave balances. Conduct retirement planning workshops at locations throughout the state in groups ranging from 5 – 100 individuals. Promote CalSTRS member education opportunities at various outreach events.</p>
5%	<p>MARGINAL FUNCTIONS</p> <p>Documents Review: Review and provide input on draft products to present clear and concise information to clients or other interested parties regarding the technical complexities of RR programs and projects. Make presentations to management, staff and field benefits specialists on the Quality Management program.</p>

COMPETENCIES

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- Customer/Client Focus

- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies:

- Analytical Thinking
- Decision Making
- Diagnostic Information Gathering
- Ethics and Integrity
- Initiative
- Managing Work
- Technical/Professional Knowledge and Skills
- Thoroughness

CONDUCT AND ATTENDANCE EXPECTATIONS

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